# Implementing Rapid Improvement Events Across the ALC --April 2003--

D200A Computation Process

Buy PR Process

Repair PR Process

Market Research Overview

J & A Overview

Briefer: Mrs. Sue Gruber, LA Change Agent, 6-7529

As of 11 Aug 03

# Agenda

- Why Change?
- Lean Background
- The New Processes
- Questions & Answers

# Background

## Why Change??--The World Has Changed

**SECDEF Speech to National Defense University** *31 Jan 02*

threats unlike any before

- Continuum of conflict
- Wide spectrum of threats
- Move from threat-based to capabilities-based planning
- Focus on effects required not targets to be destroyed

# Summary

## Transformation – A Living Example

"Here we are in the year 2002, fighting the first war of the 21st century, and the horse cavalry [is] back [and]…being used in previously unimaginable ways. It showed…a revolution in military affairs is about more than building new high tech weapons…it's also about new ways of thinking and new ways of fighting."

*~Secretary of Defense Donald Rumsfeld~*

***. . .And New Ways of Supporting***

# Some Lean Background--

# What Happens During a Rapid Improvement Event?

- Preparation--Gather Data
- Functional Experts from Different Product Directorates (PDs) are Brought Together--a Team Approach
  - Discuss How the Process Works Today
    - Determine Bottlenecks
    - Determine Value Added/Non-value Added; Necessary/Unnecessary
    - Determine What's Working Well
  - Devise a New Process--a Future State which Eliminates the Waste
- For ALC Events--All PDs are Invited to Participate
  - PDs Have the Opportunity to Attend Daily Outbriefings for a Heading Check
  - With Command Section Acceptance of the Final Briefing, the Future State Becomes Policy to be Adopted across the ALC.
- Implement the Standardized Process across the ALC!

# The Way We Are Today

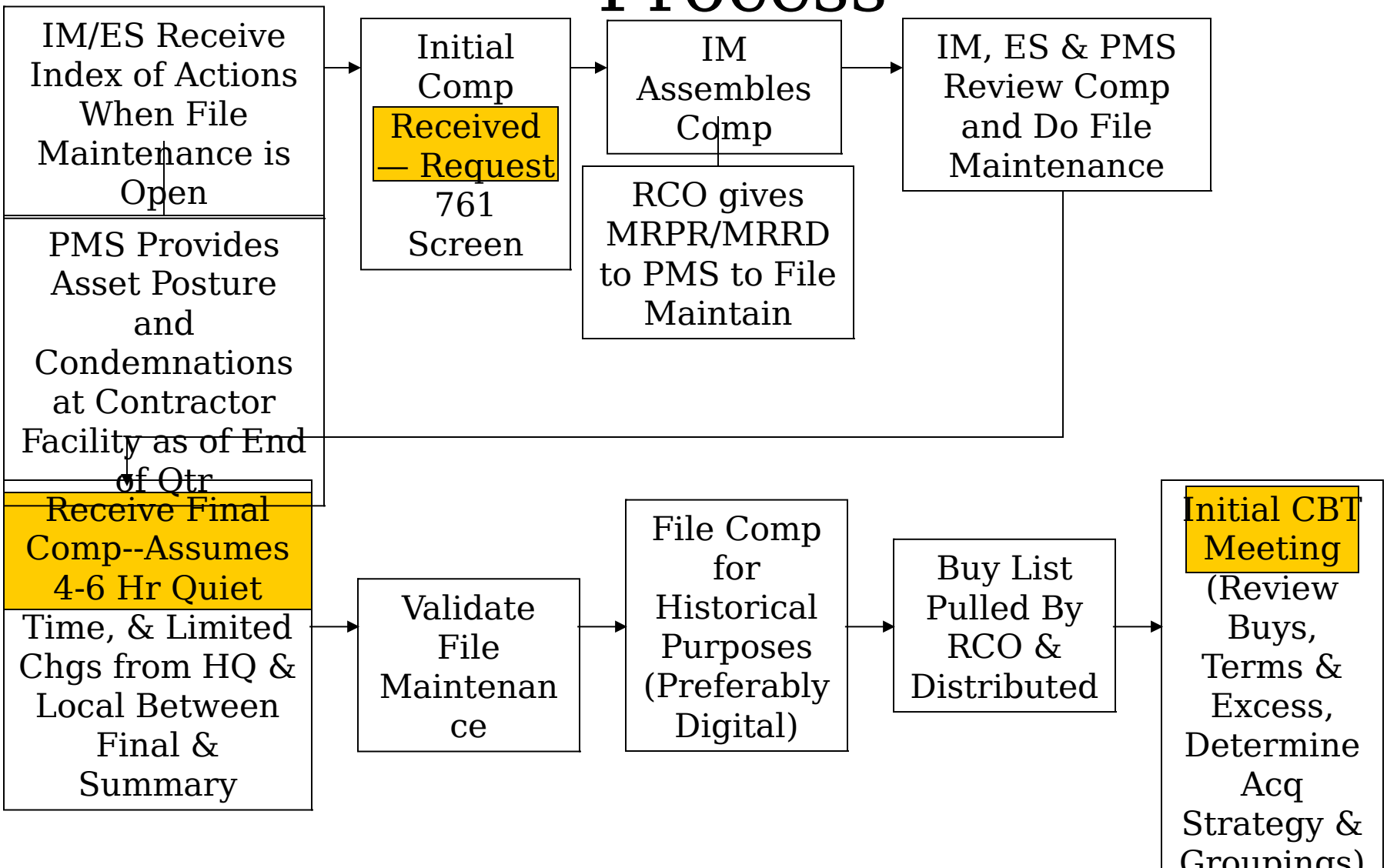
- PR Initiator (IM or PMS) often Fends for Him/Herself
- Little Team Effort
- Packages Bounce Back and Forth Between Offices
- No Two People Interpret Things the Same Way
- Communication is Lacking
- Generally, it Takes Forever to Get a PR Package Out--There are of Course, Exceptions
- No Standardization
- Processes are Cumbersome

# For the Future--Common Threads

- The Requirements Portion of the Acquisition Process is a Team Effort
- The Program Manager/Loggie/IPT Lead is the Quarterback
- Do the Planning Up-Front
- Do Coordination Together in One Room, at One Time, On Screen
- Communicate Constantly
- Changes are Not Revolutionary, but They Offer Significant Potential for Improvement
  - Clearly Defined Roles & Responsibilities
  - Accountability
  - Standardized Processes
- An Evolving Process--Many Changes Identified That are Not Doable Today, But Are on the Horizon

# The Future Processes--
# Starting Today
# with the D200A Computation

# New D200A Computation Process

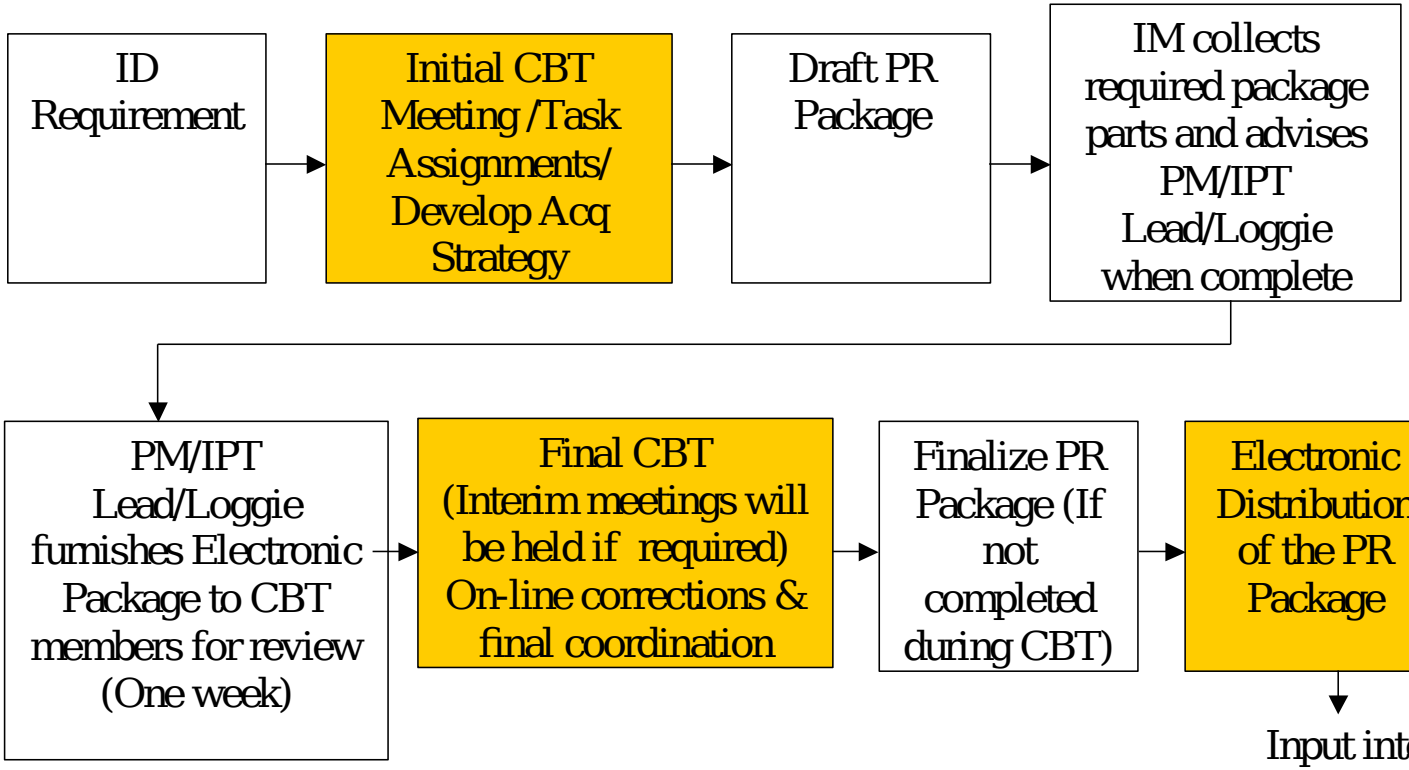

IM/ES Receive Index of Actions When File Maintenance is Open
Initial Comp Received — Request 761 Screen
IM Assembles Comp
IM, ES & PMS Review Comp and Do File Maintenance
RCO gives MRPR/MRRD to PMS to File Maintain
PMS Provides Asset Posture and Condemnations at Contractor Facility as of End of Qtr
Receive Final Comp--Assumes 4-6 Hr Quiet Time, & Limited Chgs from HQ & Local Between Final & Summary
Validate File Maintenance
File Comp for Historical Purposes (Preferably Digital)
Buy List Pulled By RCO & Distributed
Initial CBT Meeting (Review Buys, Terms & Excess, Determine Acq Strategy & Groupings)

# The Future Process--
# Starting Today
# with the PR Buy Process

# The New Metric

- Time Begins When the Requirement Generates (D200A Computing Secondary Item Stratification [CSIS]) and Ends When Contract is Awarded!
  - Teamwork Will Be Key to Making This Work!

# New Process for Preparing a Buy PR


ID Requirement
Initial CBT Meeting /Task Assignments/ Develop Acq Strategy
Draft PR Package
IM collects required package parts and advises PM/IPT Lead/Loggie when complete
PM/IPT Lead/Loggie furnishes Electronic Package to CBT members for review (One week)
Final CBT (Interim meetings will be held if required) On-line corrections & final coordination
Finalize PR Package (If not completed during CBT)
Electronic Distribution of the PR Package
Input into J041/ Contracting Portion of the Process

Assumptions:
-Buy is more the $100K.
-This is a new buy with no contract in place.

**GOAL: Produce a quality PR Package in a timely manner that meets the warfighters' requirements.**

# New Buy PR Process

- *During Initial Contract Buy Team Meeting, PM/Loggie/IPT Lead:
  - Chairs the Meeting
  - Decides if and how many items can be grouped

    PM/Loggie/IPT Leads Need to Interact to Determine if Other Strategic Groupings are Possible
  - Works with Team to Determine Strategy for Buy
  - Sets Suspense for Team Member Taskings
  - Ensures Members have PR Checklist
  - Prepares the Justification & Approval Package (J & A) with input from the Team, if Applicable

***This meeting is also covered in the Comp and Repair PR Processes**

# New Buy PR Process (Cont'd)

- Item Manager is Tasked to Accomplish the Following:
  - Initiates AMC/AMSC Screening (Form 761) *if not done already*
  - Form 36--Specify Quantity & Cost Depending on the Type of Contract (Basic Contract w/ Options, Blanket Contract (Indefinite Delivery/Indefinite Quantity))
  - Check IRIS--DRMO excess query for assets--web based
  - Check AMARC--Availability of assets at Davis-Monthan AFB
  - Check Haystack--Procurement History
  - Request Shipping/Packaging Information
  - If competitive, Request Master Bid Set
  - Initiate Form 807, provide to ES
  - Initiate ODS Statement, provide to Engineer
  - Make Sure PR Quantities Match Final CSIS

# New Buy PR Process (Cont'd)

- Equipment Specialist is Tasked to Accomplish the Following:
  - Prepare Synopsis information describing form, fit & function; Furnish to IM for Inclusion on Form 36
  - Check CDMS Work Basket; Accomplish Required Tasks
  - Perform Data Call--AFMC form 365, TOs, etc.
  - Initiate DD Form 254, if Required for Classified Information
  - Provide input to the Form 807 and pass to the Engineer

# New Buy PR Process (Cont'd)

- Engineer is Tasked to Accomplish the Following:
  - If First Article Test is Required, Prepare Form 260 and the Contract Data Requirements List (CDRL) (Form 1423)
  - If First Article is Required, Prepare the Statement of Work (SOW) or Statement of Objectives (SOO)
  - Conduct Market Research (Overview follows), *if not Done Already*
  - Complete ODS Statement
  - Be available for consultation.
  - Reviews & Signs Form 807, Returns to IM

# New Buy PR Process Cont'd

- L_K Person is Tasked to Accomplish the Following:
  - Will be Asked for Guidance/Expectations, and will be Available for Consultation Throughout the Process.
  - If Any Doubt as to the Adequacy or Accuracy of the J&A or Market Research, the L_K Person will Work with the Program Manager/IPT Lead/Loggie and Small Business (BC), Competition Advocate (PKP) or Acquisition Excellence (AE), to Resolve any Issues Prior to the Final CBT Meeting

# New Buy PR Process (Cont'd)

- All parties will be given clear guidance and expectations and will be told to provide products to the Item Manager by a Given Date
- Program Manager is kept abreast of any Problems and Elevates to Management for Resolution, if Necessary
- The Item Manager will use the PR Checklist to Quality Check the Package and will Consult with the L_K Person When Needed
- The Item Manager will Advise the PM/IPT Lead/Loggie when the package is Together and Ready.
- The PM/IPT Lead/Loggie will Advise the CBT Members (next Page) that They Need to Convene
- The Item Manager will Provide One Complete Buy Package to each CBT Member at least one Week In Advance of the CBT Meeting (Preferably Electronically)
- Each Member of the CBT will conduct a Thorough Review of the Package and be Prepared to Make Any Changes at the Meeting.

# New Buy PR Process (Cont'd)

- The Team will consist of the following:
  - Program Manager/IPT Lead/Loggie, Chair
  - Equipment Specialist
  - Item Manager
  - Engineer
  - L_K Person
  - Optional Players--At the Call of the PM
    - Data Management Officer
    - Acquisition Center of Excellence (AE) as dictated by $ value
    - Competition Advocate (PKP)
    - Small Business (BC)
    - Transportation/Packaging (LGMT/LGMTTP)
    - Financial Management (FM)
    - User
    - AMC/AMSC Screening Technician
    - Others, as Required

# New Buy PR Process (Cont'd)

- The Final CBT Meeting will be Convened
  - The IM will take notes, if paper is used; otherwise, Edits will Occur on Screen, using Computer Projection
  - All Parties May Suggest Changes, and They will be Input
  - The Goal is to Resolve All Issues during the Final CBT. If Necessary, Elevate/Call In Management To Arbitrate.
  - With Any Necessary Changes Incorporated, the Attendees Will Coordinate on the PR Package

# New Buy PR Process (Cont'd)

- The Fully Coordinated Package will be sent to PR/MIPR Control (Preferably Electronically) for further Processing.
- Note--Electronic Coordination is being Looked at for the Future

  An Automated PR Generation & Tracking System is being Refined and Upgraded for Export to all PDs—Currently Being Tested

  System will Have Automatic Feed to R2M

  By Dec, Hope to Have Automatic Feeds to ACPS

# New Buy PR Process Metrics

- Time from Form 36 Initially Typed to Convening of Final CBT
- Time from Form 36 Initially Typed to Given to PR/MIPR Control or Equivalent
- Time from Given to PR/MIPR Control to Input into J041
- Planned vs. Actual Days for a. Prepare PR package; b. Convene Final CBT, and c. To J041 Input by PR/MIPR Control
- Form 761 Processing Time

# New PR Buy Process Cont'd

- As a Result of the **PK Solicitation Event** (Training is Being Developed So That We Can Implement):
  - IMs will Provide Item History
  - Synopsis & BC Coordination To Occur In Conjunction With CBTs/CRTs
  - Team will Work the J&A
  - Projects in Review:
    - IMs prepare Synopsis and Post to Fed Biz Ops
    - IMs will Post/Provide Data
    - PR/MIPR Clerk Combining "R" & "00" Cards
    - Exploring Feasibility of Centrally Locating PR/MIPR Controls

Visual Tracking Sheet

# *PR Package for System X Buy Contract*

| ID Requirement | Obtain 761 (if needed) | Acquisition Strategy Development | Develop PR Pkg | Final CBT | ’00’ Card Drop/ Input in J041 |
|---|---|---|---|---|---|
| Planned Time: Beginning date | 1 work day | 1 work days | 45 work days | 5 work days | 2 work days End date |
| Actual Time: | | | | | |
| Status/ Problems Encountered: | | | | | |
| Rework Required: | | | | | |

Updated by IM once per week

Sets an expected timeframe in which this PR Package should be completed.

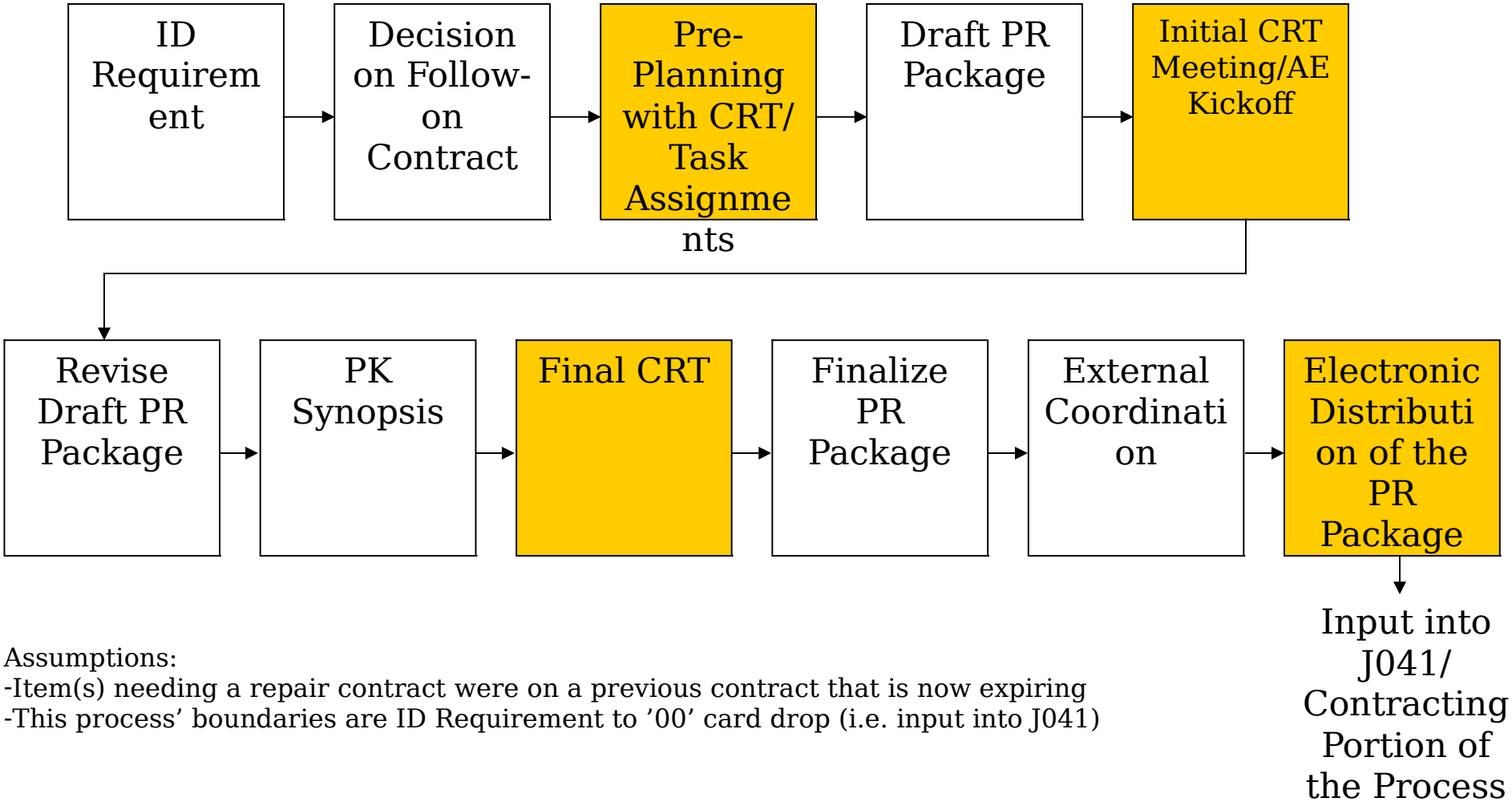
Keeps track of the time in each step of the process (currently, there is little-to-no insight into the pre-contracting portion of the process)

Enables management quick insight into what’s going on in this process and alerts them of issues that might require their assistance.

Identifies problematic areas that need to be addressed.

# The Future Process--
# Starting Today
# with the Repair PR Process

# New Process for Preparing a Repair “Planning PR




Assumptions:
-Item(s) needing a repair contract were on a previous contract that is now expiring
-This process’ boundaries are ID Requirement to ’00’ card drop (i.e. input into J041)

**GOAL: Produce a quality PR Package in a timely manner that meets the warfighters’ requirements**

# The Future Process--
# Starting Today
# with the Market Research Process

# Market Research Overview

**(For More Details, see the Handbook Provided)**

- Market Research gathers Current Data on Existing Market Sectors to Identify Potential Sources of Supply, Commercial Product Characteristics….so that Smart Acquisition Strategy Decisions Can Be Made.
- When a Requirement Generates, the Program Manager Will Ask the Engineer to Perform Market Research
- Market Research is Required for all Contracts $100K Plus and Below $100K if Adequate Information is not Available

# Market Research Overview

**(For More Details, see the Handbook Provided)**

- Two Kinds of Market Research--Surveillance and Investigation
- Sources Sought Synopsis may take 45 days--Plan Ahead!
- Prior Market Research Can Be a Starting Point
- AE & Market Research Can Be Found on the WR-ALC/PK Web Site (https://rgre9402.robins.af.mil/AE/default.asp)
- If you have Questions--Call Mark Leslein, WR-ALC/AE, 6-0281

# The Future Process--
# Starting Today
# with the Justification & Approval
# (J & A) Process

# Justification & Approval (J & A) Overview

**(More Details will be Provided in a Handbook to be Provided at a Later Date)**

- Use Team Approach Early-On (Led by the PM/Loggie/IPT Lead) to Develop the Acquisition Strategy. When that Strategy Calls for Anything Other Than Full and Open Competition, Justification (J&A at appl $) is Required.
- The PM/IPT Lead/Loggie, L_K Person, Engineer, and PR Initiator Must Discuss Requirements & Expectations Early On. Goal is to Have a Complete, Correct J & A the First Time
- Team Members are Tasked with J&A Paragraphs:
  - PR Initiator - Part 1, Paragraphs 1, 2, 3
  - PM/Loggie/IPT Lead - Part 1, Paragraphs 4, 5, 6, 8
  - Engineer - Part 1, Paragraph 7
  - Team - Part 1, Paragraph 9
  - PCO - Part 2
- The PM/IPT Lead/Loggie Consolidates the Paragraph Inputs into the J&A (LY Has Set Up a J&A Cell to Consolidate the Team's Inputs. Cell will Convene Whenever Required to Write the Words for Their J & As.)
- Competition Advocate Website (Guidance & Templates): http://pkec.robins.af.mil/pr/cr.htm

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# Implementing New Processes

- The Processes Shown Here Are to be Implemented Immediately.
  - You May Want to Consider Appointing an Implementation Team Within Your Directorate to Ensure a Smooth Transition and Standardization
- The Processes Shown Here are a Tool For PR Preparation. They Compliment Existing Guidance.
- This Presentation Provides Succinct Process Flows with Generalized Details of each Step in the Process. Detailed Information Will be Provided Via E-mail in Standard Work Guides.
- Contact Your Change Agent with Ideas For Improvement, Concerns, or Questions
- Metrics Will Be Reported Monthly. Change Agents will Forward Metrics to LG for Consolidation.

# Transforming WR-ALC
## What Does it Take?

- Our focus. . .

# WR-ALC NORTH STAR

We Provide Combat Capabilities for the DoD Warfighters and Our Allies Through Superior Acquisition and Sustainment.

**Effects-Based Capabilities for the War Fighter**

# Questions??